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SCHOOL DISTRICT:
CITY & COUNTY OF
SAN FRANCISCO

AN ANALYSIS OF
RELATIONSHIPS

SAN FRANCISCO
PUBLIC SCHOOLS COMMISSION
REPORT AND RECOMMENDATIONS

DOCUMENTS

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The San Francisco Public Schools Commission was formed in January 1975 as a cooperative effort by the Board of Education of the San Francisco Unified School District and the State Superintendent of Public Instruction. The general objectives of the Commission are to identify problems in the School District and to assist in implementing agreed-upon solutions. The Commission is supported through grants from the San Francisco Foundation, the Ford Foundation, the Irwin Foundation, the Gerbode Foundation, and the San Francisco Unified School District.

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**REPORT
AND
RECOMMENDATIONS**

**INTERRELATIONSHIPS BETWEEN
THE UNIFIED SCHOOL DISTRICT AND
THE CITY AND COUNTY OF SAN FRANCISCO**

**THE SAN FRANCISCO
PUBLIC SCHOOLS COMMISSION
MAY 1976**

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SAN FRANCISCO PUBLIC SCHOOLS COMMISSION

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May 25, 1976

MR. WILLIAM M. ROTH
Chairman

DR. LUVERN L. CUNNINGHAM
Executive Director

Dr. Lee S. Dolson
President, Board of Education
San Francisco Unified School District
135 Van Ness Avenue
San Francisco, California 94102

Dear Dr. Dolson:

This report summarizes the findings and recommendations of the Commission's study of interrelationships between the School District and the City and County of San Francisco. More detailed reports on the individual study areas have been developed as well, and they will be transmitted to you under separate cover.

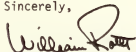
This aspect of the Commission's work was undertaken for three purposes:

1. To provide a comprehensive description of the principal administrative and service relationships that exist between the School District and various City departments;
2. To surface problem areas in which improvements can and should be made; and
3. To recommend certain modifications in the working relationships between the two governmental units that will serve better the needs of the school system.

This document should not be construed as a static report. It was developed through an extensive series of conversations with key personnel and fully reviewed at public meetings of the Commission. We believe that our findings can best be used to stimulate further discussion among those responsible for improving these interrelationships.

The Commission urges that the Board accept the report and direct the Superintendent to develop specific plans for implementing the recommendations. It is our hope that improved relationships between the School District and the City and County departments will result.

Sincerely,



William M. Roth
Chairman

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INTRODUCTION

Among the original issues to be addressed by the San Francisco Public Schools Commission was "to consider ways and means of improving relationships and strengthening cooperative efforts with other city and county agencies." The Commission's initial study of this issue found that the Unified School District and the City and County of San Francisco have a relationship which is unique among units of local government in California, and perhaps nationwide. Because the School District, the City, and the County are coterminous, the delineation of respective roles and responsibilities has historically posed a set of complex legal, functional, and political problems.

While the City* Charter cites specific responsibilities for both the Board of Education and the Board of Supervisors, nowhere does it address the nature or extent of their formal interrelationship. The Charter does not specify how their administrative units shall relate to one another. Nevertheless, numerous day-to-day activities involve both the School District and the City and County, and confusion and inefficiency frequently result.

Some School District officials believe that the only way to rectify areas of confusion is through District control of the services it needs. They feel that reliance on the City and County necessarily involves inefficiencies. On June 24, 1975, the Board of Education considered, but did not adopt, a policy of administrative separation from the City and County:

RESOLVED: That the Board of Education of the San Francisco Unified School District direct the Superintendent to place the following measure on the ballot for the election of November, 1975: that since the SFUSD is the only School District in the State of California which is not independent of the local city, it is affirmed that it be the policy of the SFUSD that the Board take every step legally, politically and morally available to achieve independence from the City and County of San Francisco, especially in personnel, fiscal and real estate matters.

The Commission has proceeded with its study of the interaction between the School District and the City and County to determine if there are ways of "improving relationships and strengthening cooperative efforts", or if administrative separation is the only reasonable solution. The Commission's purpose in preparing and disseminating this report is threefold:

* Throughout this report, "City" refers to the legal entity known as the City and County of San Francisco.

1. To provide what may be the first overall description of the various service arrangements existing between the SFUSD and the City and County, including an examination of the legal, economic, and organizational factors associated with each;

2. To highlight the problems with present District-City relationships and offer recommendations to alleviate them;

3. To identify those areas which require further, in-depth analysis due to the scope of the problems or the technical nature of the subject matter.

Scope of the Report

The Commission studied eight functional relationships between the SFUSD and the City and County of San Francisco. The eight relationships were of two general types: administrative services and services to children.

Administrative Services included the following:

1. **Financial** — services provided to the SFUSD by the City Controller and the County Treasurer.

2. **Legal** — services provided to the SFUSD by the City Attorney.

3. **Personnel** — services provided to the SFUSD by the City Civil Service Commission.

4. **Employee Benefits** — service provided to the SFUSD by the City and County Retirement System and the Health Service System.

5. **Real Property** — services provided to the SFUSD by the Departments of City Planning, Public Works and Real Estate.

Direct service to children include the following:

1. **Health** — services provided by both the SFUSD and the Department of Public Health.

2. **Recreation** — services provided by both the SFUSD and the Recreation and Park Department.

3. **Library** — services provided by both the SFUSD and the Public Library.

In the area of administrative services, the relationships between District and City departments serve the District's needs to varying degrees. In some areas, the functional relationship is defined by law, and any effort to forge a new relationship, or terminate a relationship, would require a change in the State Education Code and/or the City Charter. In others, the existing

relationship could better serve the District if procedural changes were made; these could be accommodated within existing legal provisions. Finally, some relationships are purely discretionary for both parties and could be altered or discontinued unilaterally.

In the area of relationships involving direct services to school children, there exists fewer legal constraints and less evidence of working relationships between District and City Departments. In many instances, mechanisms and procedures are identified for increasing the quality of services available to San Francisco's school children through better utilization of the City's resources at little, if any, extra expense.

GENERAL ISSUES

Prior to describing the specific functional relationships, several issues should be identified which are common to them all. These issues, or themes, surfaced time and again in the analysis, and they provide a perspective for reviewing the individual relationships from an intergovernmental standpoint. These general issues may also be used as criteria for considering the services provided the School District by the City and County. They include accountability, responsiveness, economies of scale, distribution of costs, and statutory context.

1. Accountability

Where the School District relies upon City services, the District's performance is ultimately being judged, at least in part, on factors over which District employees have limited control. Whether the District receives free services (e.g., legal services from the City Attorney) or whether they pay for them (e.g., maintenance services from the Department of Public Works), they can only influence, but not direct, the City's employees. Some District employees therefore assert that they bear the responsibility for performance without commensurate authority. They argue that the development of in-house capability will enable them to control the resources upon which their ability to perform ultimately rests, and thus they advance disengagement from the City as the solution.

2. Responsiveness

The responsiveness of City services considers both their appropriateness to District needs and the timeliness of delivery.

A. Appropriateness — The School District receives certain services from City Departments which are provided to a number of other clients as well. Thus, services are not as tailored to the District's specific needs as they might be if the District supplied them for itself. This situation has been most apparent with regard to the services supplied the School District by Civil Service and City Purchasing. The problem of appropriateness is common whenever a centralized service must satisfy the needs of a variety of clients. Tailoring services to numerous client-needs complicates the role of those providing the services and, for this reason, is often resisted.

B. Timeliness — Regardless of the appropriateness and overall quality of a particular service, its value is seriously diminished if it is not provided to the District when needed. The District can influence, but not dictate, the

speed with which City departments respond to requests for service. In many cases the District is one of many clients receiving centralized City services and must compete for resources which may be in short supply. This is of greatest concern to the District where speed of service is important, i.e., maintenance and, to a lesser extent, civil service and legal services.

3. Economies of Scale

The School District receives the benefits of certain economies of scale. In some areas, the City possesses a wider range of resources than the District could support if they supplied their own services. Such economies apply particularly to the services available from the City Attorney, the Department of Real Estate, the City and County Retirement System, and certain shops in the Department of Public Works. The District can also realize economies of scale by augmenting their services and facilities with the City's in health, recreation and library.

4. Distribution of Costs

The incidence of costs — who *does* bear them and who *should* bear them — are complex issues. At the present time the City provides some services to the District free of charge, as specified by various provisions of the Education Code and the City Charter. In other instances the City is reimbursed for the full costs of its services.

There are two distinctly different perspectives with regard to the incidence of costs. The first concerns the distribution of costs between the District and the City, i.e., how the cost burden is distributed between these two jurisdictions. Fiscal belt-tightening has increased the District's incentive to get as much free service from the City as possible, while the City would prefer to be reimbursed fully for all services, where the law allows. The second issue focuses on the total costs for service regardless of how the burden is distributed. This is a concern of the San Francisco taxpayer who ultimately supports the combined costs.

City services provided without charge to the District may be attractive to a School Board fighting to balance an over-extended budget. Nevertheless, free services pose certain problems for the District as well. First, they tend to understate the actual cost of education because they are not attributed to the school's budget. Second, they tend to be over demanded by the District precisely because they are free. Finally, the District has no economic leverage to affect the responsiveness of the City in providing such services because the District contributes nothing to their support.

5. Statutory Context

Legal constraints play a vital role in determining the opportunity for alternative arrangements if existing relationships are in need of reform. The unique relationship between the three governmental entities compounds the problem of designing alternatives. For example, under the Constitution of California, public education is a State function. Irrespective of the provisions of city charters, local school boards are agents of the State rather than of the municipalities they represent. Yet, the people of San Francisco, through their Charter, have the legal authority to set forth provisions relating to the operation of public schools. Such provisions will be given *full legal force and effect* even though they are different from the State law, provided that such provisions are to be held in furtherance of and not in conflict with State law.

Therefore, while the School District has the legal authority and responsibility to set policy and to administer the City's public school system, it must function within both the State Education Code *and* the City Charter. Such legal provisions specify certain City and County services upon which the SFUSD must rely, or to which it is at least entitled. These services can be divided into three categories.

Category 1: those services which the City and County *must* provide when the District requests them. This category is defined by State law and is limited to legal services which the City must provide, free of charge, when requisitioned by the School District. The School District, however, is free to seek its legal service elsewhere if it chooses and is willing to pay for it.

Category 2: those services which the City and County must provide *and* the School District must utilize. This Category is defined by State law and/or the City Charter and requires that *both* parties participate. Included in this category are Financial Services (Treasurer and Controller), Civil Service, and Retirement and Health Service Systems.

Category 3: those services which are not mandated but which are available to the School District and to school children, to varying degrees, as a result of tradition and policy. Included in this category are District-City relationships with respect to Health, Library, Recreation and Real Property Services (including Property Management, Construction, Planning and Maintenance). The exception to Category 3 involves all new school construction and changes in existing land use patterns which, under Charter provisions, are subject to a Master Plan review by the City Planning Commission.

Conclusions

The Commission's recommendations are the result of weighing factors which, in each case, involve tradeoffs. In many instances specific steps might be taken to improve the existing relationship before the District considers disengagement. Mechanisms for cooperation must be developed so that District and City resources are being utilized effectively and joint planning is rewarded rather than discouraged.

Some relationships work well for both parties because of the particular individuals involved in the cooperative efforts. In other cases, particular individuals are responsible for many of the problems. Those who advocate the School District's independence from the City and County point to what they believe will be an increase in District efficiency, accountability and freedom from the politics of municipal government. To believe, however, that this will occur purely by virtue of disengagement from the City and County is naive. There is nothing inherent in a move towards autonomy that will make a governmental unit more efficient, less political, or more effective in achieving its objectives. Only an understanding of the procedural and human factors causing problems offers the prospect of improved District performance.

DESCRIPTIONS AND ANALYSIS

For purposes of description and analysis, the relationships between the City and County and the School District are divided into two general groups: administrative services and direct services to school children. Each of the eight relationships is described according to (1) specific legal provisions, if any; (2) the current process whereby the service is rendered; and (3) the key issues with respect to each.

ADMINISTRATIVE SERVICES

1. Legal Services

Under State law, the County Counsel *must* advise the School District, defend all damage actions against the District, its employees and officers, and prepare all legal material for school bond elections without fee (Gov. C. 26529, Ed. C. 1015). The City Attorney's office serves as County Counsel in fulfilling this responsibility to the District. The District *may*, however, (a) appoint an administrative advisor (Ed. C. 945); (b) hire outside counsel for special cases (Ed. C. 1016, 1016.5); (c) appoint legal counsel, relieving County Counsel of responsibility for providing legal services to the District (Ed. C. 945.1); or (d) pay the County Counsel to supplement the services "customarily" provided (Ed. C. 1016.6).

At the present time the School Board has a fulltime Administrative Advisor, who is an attorney and who is responsible directly to the Board; a second attorney was recently added to his staff. Further, the equivalent of approximately 1½ full-time lawyers in the City Attorney's Office provides legal service for the School District. For these services, the District pays for filing fees and incidental costs of litigation, totaling approximately \$15,000 last year, plus the salary of a legal stenographer in the City Attorney's Office.

Although the City Attorney is legally required to serve the District, his limited budget has become increasingly inadequate to meet the growing demands for services by the School District and numerous City Departments. In this context the School District has alternative ways to increase its legal resources: assign priorities to the work of the Administrative Advisor; expand in-house legal staff; supplement the City Attorney's budget with funds to provide additional services to the School District; reduce the demand of the Board and the District staff for legal advice; or use combinations of the above.

Recommendations:

- a. The current arrangement with the City Attorney's Office should be retained.
- b. Outside counsel should be retained, supervised by the Administrative Advisor, in cases where:
 1. Special technical competence is required.
 2. The City and District are in substantial conflict in a legal action.
- c. If the District determines a need for additional, on-going legal services, the District should contract with the City Attorney for "supplemental" services, in addition to those currently being provided. The scope of such supplemental services might include the costs of an attorney, in addition to the current level of legal services. Such additional legal service would include representation of the District's interest with respect to actual or potential claims for damages against the District, including investigation.
- d. Some of the tasks currently being performed by the Administrative Advisor's office, such as early claims processing and preparation of bond materials, should be reassigned to the City Attorney's Office or to outside counsel, leaving the Administrative Advisor free to provide essential, internal legal advice on administrative and policy matters for which the office was created. If these assignments are made, only one lawyer — the Administrative Advisor — should be needed on the School District staff.

2. Financial Services

A. County Treasurer

Under State law, all School District funds must be held on deposit with and be disbursed by the County Treasurer. The Treasurer invests School District funds together with all other City funds.

State law also requires that interest earned on such funds be credited to the School District's account. In San Francisco, however, the interest on School District funds has traditionally been retained by the City/County in "exchange" for services provided to the District. Net interest earned on School District funds, excluding capital funds, amounted to \$1,450,000 in 1973-74 and \$816,000 in 1974-75. This amount was returned to the general fund in the City/County.

Recommendations:

- a. In compliance with State law, the interest earned on School District funds which are, by law, on deposit with the City/County Treasurer should be credited to the School District account.
- b. If such interest is documented to be in lieu of payment for City services to the School District, such payment should be stipulated in a formal agreement, and transfer of funds for services received should be made to the appropriate City department.

B. City Controller

The Education Code provides for two alternative methods of disbursing funds from the School District's accounts. Either the County Auditor must provide the disbursing services, *or* the School District may apply to the State Superintendent of Public Instruction for permission to appoint its own district auditor or disbursing officer (Ed. C. 21101 et seq.). The SFUSD utilizes the City Controller, acting as County Auditor, for accounting, auditing, and disbursing functions at no charge.

The District is presently implementing a plan for transferring the purchasing function from the City to the School District.* Bill paying functions will be transferred from the Controller to the District as the District assumes the entire purchasing function. The District plans to phase in assumption of general ledger accounting and payroll functions as well, arguing that adequate fiscal control requires integration of budgeting, accounting, and payment functions.

Recommendations:

- a. The payment functions of the Controller should be transferred to the School District *at such time as* the purchasing function is assumed by the School District.
- b. If the District is successful with the management of the purchasing and attendant accounting functions, assumption of general ledger accounting and disbursing functions could then be accomplished.
- c. This transfer should be made at such time and in such a manner as to allow for necessary phase-in and assurance of the adequacy of District procedure.

* The transfer of the purchasing function to the School District was previously recommended by the Commission.

3. Personnel Services

The State Education Code outlines extensive provisions for a merit system for School District classified employees. These are both substantive and procedural in nature. The Education Code, however, treats the San Francisco Unified School District as a special case and requires that the District's classified employees be part of the City's Civil Service system, as provided in the City Charter (Ed. C. 13580, City Charter 8.100 et seq.).

At the present time, the City Civil Service Commission provides a wide range of personnel services for the School District at no charge. The services include: position classification; recruitment, screening and examination of applicants; establishment of eligibility lists; transfer of classified personnel between the District and the City; and conduct of promotional exams and grievance procedures. From an employee point-of-view, a single civil service system for classified employees provides more flexibility for career advancement and job protection through transfer rights in and out of the District. Whether this situation is advantageous to the employers is not as certain.

There is increasing interest on the part of the District to decentralize their personnel services and, perhaps, to disengage entirely from Civil Service. District policy-makers feel that decentralization will permit filling of positions on a more timely basis, and recruitment of personnel whose skills more closely fit District needs. Further, they believe that staff loyalty to the School District will be increased; employees will view their careers as being solely with the District, instead of alternating between the District and the City and County. At present, however, the staff capability to perform such personnel functions, partially or totally, does not exist within the SFUSD.

Recommendations:

- a. The School District should improve current relationships with the Civil Service Commission through efforts to increase communications and identify problems which can be addressed under the existing system.
- b. The School District should re-examine its own Classified Personnel Administration, placing more emphasis on developing this important staff function and improving the current policies and procedures. Responsibility and authority should be delegated to a unified personnel office.
- c. The School District should work with the Civil Service Commission to develop a plan for District assumption of decentralized civil service responsibilities. This decentralization should

be accomplished by working out an agreement with the Civil Service Commission which clearly specifies policies, procedures and organizational responsibility. The Public Schools Commission stands ready to assist the District and the City in developing this agreement.

- d. The Board of Education should approve a new position of "School Secretary" and request that the Civil Service Commission develop a new classification, with job description, qualifications, and salary, based upon recommendations from school principals.

4. Employee Benefits

Prior to June 30, 1972, all permanent employees hired by the City and County of San Francisco, the SFUSD, and the Community College District became members of the City and County Retirement System, as required by City Charter. State law requires that **certificated employees** of the SFUSD and the Community College District hired after that date automatically become members of the State Retirement System. While the number of certificated employees with the City and County Retirement System will therefore decline through future years, **classified employees** will remain with the System unless a Charter amendment is adopted calling for a different arrangement. The City Charter further states that the administrative cost of the Retirement System "shall be met by contributions to the Retirement System by the City and County of San Francisco" (Charter 8.509-8.510).

The Health Service System is administered by the Health Service Board, as provided for in the City Charter (Section 8.420). Permanent employees of the SFUSD become members of the System automatically on the day following the first pay period in which they become members of either the City and County Employees Retirement System, the State Teachers' Retirement System, or the State Public Employees Retirement System. Both the employee and the employer contribute to the health service plans, with the amount of the employee's contribution dependent upon the particular plan chosen. Employer contribution is a fixed amount.

There does not appear to be a desire on the part of any group to alter the current administration of these benefit programs. The District does benefit by not having to contribute to the administrative costs of the Retirement System. It is not clear at this time how District classified employees would be covered should the District eventually choose to disengage from Civil Service, and such disengagement was accomplished. At the present time, SFUSD employees receive better benefits because they are part of large plans involving many non-District employees. Smaller plans for District

employees alone would probably require a higher rate of administrative costs and provide generally poorer benefits.

Recommendations:

The current arrangement for administering employee benefits should be continued, but an individual should be identified within the District who would be responsible for communication with officials of the Health and Retirement Systems and for the efficient and timely dissemination of information to the employees.

5. Real Property

A. Property Management

The Director of Property for the City and County of San Francisco handles all leasing, purchase, and sale of real estate by the SFUSD. The School District pays the City approximately \$26,000 annually for the services of this office. Because necessary legal documents are available only in the City's Real Estate Department, coupled with the Director of Property's experience and impartiality, the District receives a service which would be unavailable elsewhere. The District benefits as well because it pays the Director of Property only for the staff services it receives. This amounts to considerably less than one fulltime "right-of-way" agent and support staff.

The SFUSD has jurisdiction over 180 parcels of land at the present time. The title of over 70% of these parcels, however, is vested with the City either through City land grants or City purchase. The balance have titles vested with the District. It is important that the legal right to the revenues resulting from the sale of all educational properties be verified so that the District and the City and County can plan for future land use and be confident as to the beneficiary of sale.

B. Construction

District construction projects have, until recently, been managed by the City's Bureau of Architecture. In 1974, over \$300,000 was paid to the City by the District for these services. Last year, however, the School Board decided to contract for construction management service with a private firm. This firm is assisting the District to develop in-house capability in construction management and is clarifying a range of policies and procedures for contractors who bid on District projects. Nevertheless, the Bureau of Architecture continues to oversee those projects which have been financed with City funds. This involvement will gradually diminish as new construction projects are financed by the District.

C. Planning

The relationship between the SFUSD and the City's Planning Department is not a close, functional one. In September 1972, a memorandum of agreement between the SFUSD and City Planning outlined a strategy for preparing a citywide plan for educational facilities as part of the City and County's Master Plan. This strategy was never implemented, largely because of the proposed costs involved.

The SFUSD's Division of Facilities Planning has provided the District with in-house planning capability. City Planning has played a supportive role in this regard. There is a need, however, for the City Planning Department to play a major role in planning for the coordinated use of District facilities and related City facilities, such as health clinics, child care centers, libraries and parks.

D. Maintenance

The SFUSD's Maintenance Department pays the City's Department of Public Works (DPW) over \$1.3 million annually for maintenance and repair services. These services include the utilization of City glaziers, locksmiths, electricians, plumbers, cement makers, steam fitters and metal workers.

Over the years, the District's maintenance budget has stabilized and, with a continuing increase in the cost of labor, the same \$1.3 million purchases considerably fewer man-hours. District maintenance activities have thus retrogressed from preventive and routine maintenance to predominantly emergency maintenance. This shift has caused an increase in problems between District and Department of Public Works personnel. As more work is of an emergency nature, the time-consuming process of obtaining services from DPW through work orders becomes less acceptable. And, in an effort to increase City responsiveness, District staff artificially inflate the volume of jobs designated "emergency", thus compounding the problem.

The District wants to develop in-house capability to handle their own glass, lock, and electrical work. It is generally recognized that the other services, especially steam fitting and metal work, would be better left with DPW on a contract basis. The District does not generate enough work to justify the sizeable expenses required to operate such shops.

The primary issue from the District's point of view is control; with DPW craftsmen reporting to DPW supervisors, it is difficult for the District's Maintenance Director to effectively allocate manpower on short notice. And with the number of "legitimate" emergencies increasing, many of the work orders require prompt attention.

In addition, District personnel feel that if they employed their own craftspeople they would save money. They point to the City's assessment of 60% overhead attributable to labor and claim that the District's overhead is less. However, two-thirds of this 60% goes to fixed employee benefits which would be borne at the same level if the District took over the maintenance services directly. Further, the District would bear start-up costs for equipping those shops currently operated by DPW.

Recommendations:

Ownership.

- a. The District should bring a quiet title action, based on the stipulated facts, on the Grant School property. This property is presently listed as surplus property by the School District and is comprised of parcels bearing all three forms of title: part is vested with the District, part with the City as a result of a 19th century land grant, and part with the City as a result of City-raised revenues. Such action by the District against any and all parties claiming an interest in the property should clarify which parties have a legal right to claim each type of property as its assets.
- b. All revenues accruing from any and all sales of facilities and property used for educational purposes, at any time for any reason, should be placed in a capital improvement and facility modernization fund to be reserved only for such purposes.

Management

The School District should continue to utilize the services of the City's Department of Real Estate on the same contractual basis as is currently done.

Planning

The School District should develop an educational component as part of a city-wide neighborhood services plan in cooperation with the City Department of Planning. This component should include an inventory of schools, parks, libraries, child care centers, and other facilities and services related to education so that coordination between District and City programs can be facilitated. The plan should address alternate public uses, other than educational, for property being declared surplus by the School District.

Maintenance

- a. The School District should review its procedures for designating maintenance job priorities as soon as possible. It should develop specific standards for designating a job as an "emergency" and, once specified, should adhere to those standards when requisitioning work from the Department of Public Works.
- b. Glass, electrical, locksmith and plumbing repair work should be considered for transfer to the School District maintenance department if the District is unable to increase City responsiveness through the establishment of guidelines to ensure prompt response to real emergencies.
- c. Development of in-house capability in these areas should be accomplished, wherever possible, by transferring DPW craftspeople to the District.
- d. The School District should provide the Department of Public Works with a written, long-term agreement (minimum five years) to continue receiving cement, metal and steam fitting services from DPW. This will permit the City to plan for their own future staffing and equipment needs with the assurance that the District's demand for service will continue.
- e. The District should take every fiscal measure possible to increase the maintenance budget so that it has, at minimum, the purchasing power that it had two years ago.

Cost Factors

Increasingly tighter budgets for both the SFUSD and the City and County has placed a premium on cutting costs and increasing efficiency. SB 90 places considerable restrictions on the amount of revenue the District can generate, and continued increases in expenditures may create a shortfall of funds by as much as \$31 million by 1980.* Given this bleak outlook, one would expect the District to be looking for free services wherever possible.

The majority of services which the SFUSD receives from the City Attorney, Civil Service Commission, City Treasurer and Controller are free of charge. The District pays for filing fees and incidental costs of litigation, and for one legal stenographer in the City Attorney's Office. The District pays for the services of one accountant from the Controller's office to audit cafeteria account warrants. There is no charge levied by the County Treasurer, except that the District receives no interest in the funds which it deposits with the Treasurer.

* The revenue and expenditure projections are shown in the Commission's series of reports on the "Fiscal Future of San Francisco's Public Schools."

The majority of money paid by the District to the City goes to the Department of Public Works for maintenance, construction management, and architectural design work. The use of DPW craftspeople for District maintenance costs the District approximately \$1.3 million annually. Special projects from time to time can inflate this figure. Further, approximately \$25,000 is paid to the City's Department of Real Estate for service regarding the leasing, purchase, and sale of real estate.

In 1974-75, the SFUSD encumbered \$2,102,740 for payment for City services to various departments.* These figures include only general fund accounts, and are shown as follows:

Department of Public Works . . .	\$1,861,780
City Attorney	9,850
Director of Property	38,150
Controller	47,945
Purchasing	145,015
	<hr/>
	\$2,102,740

Additional payments were made, principally to the Department of Public Works, from school bond revenues and from special revenue funds; they are not included in this breakdown. Further, the payment of \$3,600 to the Department of Recreation and Parks for the use of City swimming pools will be discussed in the next section on "direct services".

These figures will be somewhat lower in the future if the purchasing function is assumed by the District. Although the District is phasing out the role of the Bureau of Architecture in construction management, these funds in the past came from bond revenue monies, including Field Act Bonds, rather than general fund monies.

DIRECT SERVICES TO CHILDREN

There are a number of City and private agencies that provide direct services to children while they are in school. The three major areas of health, libraries, and recreation are considered here. Other services, such as child care and juvenile justice programs, should also be considered in future efforts by the City and the District to improve coordination.

* Actual expended figures are not available at this time.

1. Health

The only duties of a school district in regard to student health are to "give diligent care to the health . . . of pupils", to cooperate with local health officials in preventing and controlling communicable diseases, to test vision and hearing, and to provide first aid kits (Educ. C. 11701, 11704, 11823, and 11951). A district may hire a superintendent of health to provide additional services (Educ. C. 11751). Finally, a district may contract with the board of supervisors for the county health department employees to perform health functions in the schools (Educ. C. 11703).

The City Health Department assigns approximately 80 nurses to work from 25% to 75% of their time in the City's public and private schools. This assignment represents approximately 30 full-time equivalent nurses, of which 24 work in the public schools. The balance of the nurses' time is spent at baby clinics, with family planning and family health matters, and providing crippled children and geriatrics services. The nurses serve 2-3 schools per week; no school has a full-time nurse on duty. In addition to the nurses, the City pays for three audiometrists to test the hearing of students.

The SFUSD employs three vision screeners and 26 paraprofessional health aides. Ten health aides are full-time and 16 are part-time. In addition, the District has a modest health education program and a range of services available through their special education and crippled children programs. A Central Health Committee, composed of key District and City health personnel and representatives from the private schools, the medical society, and other organizations, meets monthly to discuss issues of mutual interest in the delivery of health services to San Francisco children.

The major role served by nurses is to examine youngsters with chronic problems and to determine the nature and extent of treatment. It is then the nurse's responsibility to involve the parents in consultation and, if necessary, treatment at an appropriate health facility.

The relationship between nurses and District employees is not always positive. Nurses report to their supervisor in the Health Department and, in most instances, are relatively independent of the school principals. Though the health aides were originally intended to assist nurses, they appear more to supplement them; most health aides are assigned to schools when the nurse is not there.

Many nurses are provided inadequate facilities in the schools. Some serve the schools reluctantly, others quite willingly. It is unclear whether the efforts of the Central Health Committee have motivated top policy-makers in the District and in the City Health Department to plan for more effective delivery of health services.

Recommendations:

- a. The organization and administration of health services should be centralized within the SFUSD by giving one individual the responsibility for coordinating the District's health aides, vision screeners, and family life education program. This individual should also serve as the liaison with City health personnel assigned to the District, such as nurses and audiometrists. He or she should also coordinate the procurement and assignment of volunteer health workers.
- b. The Memorandum of Agreement, prepared by the Central Health Committee, which details the nature and extent of health services to be provided to children in the public schools, the relationship among school principals, nurses, teachers and health aides and the roles and responsibilities of each should be carefully considered and approved by the top policy-makers of the District and the Health Department. Steps should then be taken to implement the Memorandum of Agreement.
- c. The District should explore the possibility of training a small percentage of site staff in administering first aid and making routine diagnoses so that schools with nurses available part-time will have a trained individual on the premises at all times.

2. Libraries

School districts in California must provide library services. They may establish their own libraries or purchase the services of a city or county library system (Ed. Code 7050, 7201, 7205).

The SFUSD has two library divisions, elementary and secondary. Over 40% of the money needed to support the elementary school library system comes from State and Federal funds. All high and junior high schools have a full-time librarian. Librarian services at the 97 elementary schools vary, however, from no librarians at sixteen schools to full-time librarians at six schools. From 1970 to 1975, the SFUSD library expenditures on books per pupil has declined from \$4.00 to \$1.50 in the elementary division and from \$4.78 to \$2.50 in the secondary division. These reductions have occurred in the face of a 45% increase in the cost of books and a 10% decrease in school enrollment.

The San Francisco Library System offers an extensive range of library services at the Main Library and the 26 branch libraries located throughout the City. Perhaps the most noted programs are those provided for pre-school children, including weekly story hours, films, puppet shows and fun hours.

Until recently, there has been no effective policy regarding the manner in which SFUSD library services and the City Library system should relate. In March 1976, however, the Superintendent of Schools, the City Librarian and the District Attorney revealed a joint plan to utilize City library facilities for various purposes. Included in the plan was the encouraged use of City libraries by classroom teachers whenever such use can be mutually scheduled. A joint SFUSD - City Library Task Force is presently exploring joint and cooperative ventures, such as acquisition of books, the development of outreach reading clinics for both adults and children in branch libraries, and regularly scheduled classroom visits to City libraries.

Recommendations

- a. The San Francisco Public Library Commission should make its appointments to the Joint Libraries Task Force as soon as possible to enable this task force to move ahead with a full complement of members.
- b. The Joint Libraries Task Force should serve as the primary vehicle for proposing policies and procedures whereby the School District libraries and the San Francisco Library system augment each other's programs for mutual benefit. We suggest that the Task Force explore the following areas as part of its study:
 - Methods whereby both library systems can coordinate their acquisition of reading material so that unnecessary duplication is minimized and economies of scale can be realized by both systems.
 - A book "loan" program whereby specialized high school courses might borrow books, for which they have limited use, from the Public Library System.
 - A program whereby the City's bookmobile might be regularly scheduled to serve the sixteen elementary schools which presently have no librarian service. Funds for vehicle replacement would have to be secured.
 - A method whereby elementary school classes are encouraged to schedule class visits to neighborhood libraries at times that are convenient for both branch librarians and classroom teachers.
 - Facilitate coordinated efforts by both systems to obtain funds through revenue sharing and manpower programs for additional personnel, and to develop volunteer programs.*

* See Appendix

- The development of programs for children sponsored jointly by school librarians and public librarians where feasible.

3. Recreation

As provided in the City Charter, the School District "shall supervise and direct recreational facilities under its jurisdiction, and the Recreation and Park Commission and the SFUSD shall have the power to supervise and direct other adjacent recreation and park facilities either jointly or severally by agreement" (Charter 3.553).

At the present time the SFUSD utilizes City swimming pools, tennis courts, golf courses and playfields for physical education and varsity sport programs. The District pays the City \$3,600 for the use of its eight pools, though the City Director of Recreation estimates that he could save \$52,000 if they were not being utilized by school programs. Other facilities are available free of charge to the District, but on a limited basis. The District does pay the City for renting Kezar Stadium for several football games each year, and for the use of City golf courses.

The SFUSD budgets approximately \$500,000 annually for administration of after-school and evening recreation programs at various schools throughout the City. The money comes from a tax override specifically intended to support these programs. (Previously, the City Recreation and Parks Department had supervised recreational activities on school property after school hours.) The District employs part-time supervisors, hired through Civil Service, to run the recreation program. There is no formal joint committee, similar to those in the health and library areas, to plan a coordinated program for the use of both District and City facilities.

Recommendations

- a. The School District and the City Recreation and Parks Department should develop a city-wide plan for the use of City recreational facilities by the District to augment the school's physical education and athletic program. The plan should be based upon a delineation of the District's recreational needs, by school and by time of day, and should reflect the nature of non-school user demand so that school utilization causes minimum dislocation of non-school use. Where non-school use is low or moderate, time should be reserved for school use at no charge to the District. Where non-school use is high and the District needs access to the recreational facility for a priority program,

they should reimburse the City for use of the facility at a mutually agreeable rate. This reimbursement is intended to assist the Recreation and Parks Department to expand its facilities, where possible, to better accommodate the high demand by both school and non-school users.

- b. A joint committee should be appointed by the Board of Education and the City Recreation and Parks Commission. This Committee should explore the feasibility of having the School District contract with the City Recreation and Parks Department to administer the after school recreation program currently administered by the SFUSD on school property. If possible, this arrangement would better coordinate the school site recreation program with the full range of City recreational services through central supervision by the City. The committee should explore, in detail, cost savings which might be attributable to economies of scale while ensuring ways of safeguarding school property and equipment during recreational use after hours.
- c. The School District should develop a work/study program in cooperation with local colleges and universities whereby physical education and recreation majors could be involved in the after school recreation program.
- d. Both the School District and the Recreation Department must pay considerably greater attention to the legal requirements for integration and quality of services in the activities and facilities which they provide.

GENERAL RECOMMENDATIONS

As a result of our review of the interrelationships between the School District and the City and County of San Francisco, the Commission has arrived at several general recommendations:

First, we recommend increased cooperation and coordination between the School District and those City departments that are involved in providing services to the District, or to children while they are in school. In many areas we found a notable lack of communication between policy-makers and between the line staff of the District and City departments. Similarly, joint planning for the use of public resources, both City and District, in the areas of joint or overlapping responsibility was minimal. We therefore endorse and encourage the use of such mechanisms as joint task forces and joint staff committees on an ongoing basis to facilitate communication and cooperative efforts between the School District and the City.

Second, while the interrelationships we examined represent a complex of formal and informal arrangements, we determined that in many cases there is a need for clarification of authority and responsibility; informal or traditional arrangements need to be re-evaluated and in each area a clear delineation of the relationship needs to be agreed upon. The need for resolution is particularly pressing with respect to the ownership of real property used for schools. Habitual patterns of communication and "gentlemen's agreements" do not suffice in the face of the increasing scope and complexity of public service organizations and shrinking City and District budgets.

Third, clarification and assessment of costs for School District services is recommended. It is, first of all, important that the true cost of education in San Francisco be known, regardless of which governmental unit actually bears the cost burden. Second, even though the District is utilizing a City service, it does not relinquish responsibility for the function; the District, therefore, must retain some management control if it is to be accountable. By reaching agreement on the price of a given service, the District acquires economic leverage and can assert claims to the full service for which it pays. The City department is provided with a direct incentive to respond to District requests. Determining costs for mandated administrative services for which the District does not pay, likewise, more directly reflects the cost of education, and makes clear that the service is not "free", although not budgeted for by the School District.

In summary, the twin phenomena of shrinking public budgets and increasing consumer demand for quality public services have influenced our conclusions regarding the relationships between the City and the School District. Both closer cooperation and a clearer delineation of authority and responsibility are necessary to assure the best use of public resources and an accurate assessment of accountability.

APPENDIX

A MINORITY VIEWPOINT ON THE RELIANCE ON VOLUNTEERS FOR SCHOOL SERVICES

The students in San Francisco Public Schools are entitled to the services which are essential elements of the learning process. The Commission has pointed up the severe shortage of library services in the San Francisco Unified School District and has suggested the utilization of volunteer staff to meet this shortage.

It is the opinion of a substantial number of Commissioners that volunteers should not be used to staff needed programs; rather the District and the City should budget and fund these programs at a level appropriate to the need. While there are many dedicated volunteers in the School District and in City programs, effective educational planning requires that personnel assigned to critical programs be selected for the skills they can bring, be held accountable for the tasks assigned, and be available on a scheduled basis. One or more of these elements is often missing in programs staffed by volunteers.

Reliance on volunteers also tends to delay honest confrontation with major problems and to postpone necessary and more permanent solutions in the area of human services. There is a severe unemployment problem in San Francisco and the need for job development has been recognized by all; in such a situation, it is a disservice to suggest the use of volunteers when paid, career-oriented work could be made available through the use of federal, state and city job development funds. It is also possible to provide work-study opportunities for students in these areas of identified need.

San Francisco is a city with a highly diverse ethnic population. The Commission has already indicated in other reports that school personnel does not reflect this cultural variety. In recent years, some change in "complexion" has come through the use of paid paraprofessionals, hired under special programs to meet identified needs. The consistent volunteer, able to commit regular and prolonged periods of time to a task, without pay, tends to come from a small segment of the population. Few racial and ethnic minorities would be able to function in this capacity, thus exacerbating the already exclusionary image of the School District.

It is our opinion that the School District and the City should reorder budget priorities to provide the necessary funds to assure that the real needs of school children are met. Volunteers can and should be called upon for *ad*

hoc, task-oriented, limited time activities, but should not be used as substitutes for full or **part-time paid staff** on priority programs.

An Additional Note:

Neither the majority nor the minority recommendations concerned with the shortage of library personnel take note of a promising resource whose cost would be minimal — high school students.

The District's Board and Superintendent are formally committed to developing a wide array of programs to better meet the needs and interests of the City's high school students. The District should explore, as one means of strengthening its high school program, offering credit to high school students who want to be trained to provide services in libraries.

There is now considerable belief among educators that both groups of students gain when older students assist younger ones in educational programs. The appropriately trained high school student gets experience and the opportunity to profit, both academically and practically, from close association with reading materials, as well as from teaching and helping younger pupils.

There will never be enough money available to provide all of the educational services that might be valuable. At the present time, it is urgent that high schools offer responsible opportunities which promote learning and maturity, and give students glimpses of career options, as well as of their role as citizens.

This suggestion in no way questions the desirability of diligently searching for funding to increase the number of salaried library personnel, nor the merit of supplementing professional and other staff with volunteers.



